Enroll360 Audiences

How to Navigate Appily's New Lead Portal

This document outlines how to navigate Appily's new lead delivery portal, including how you can access your Appily inquiry and Candidate files, add new users to your portal, and setup an SFTP connection. If you have trouble accessing your account (and the Forgot Password function has not solved the problem), please contact Partner Support at cx-partnersupport@eab.com.

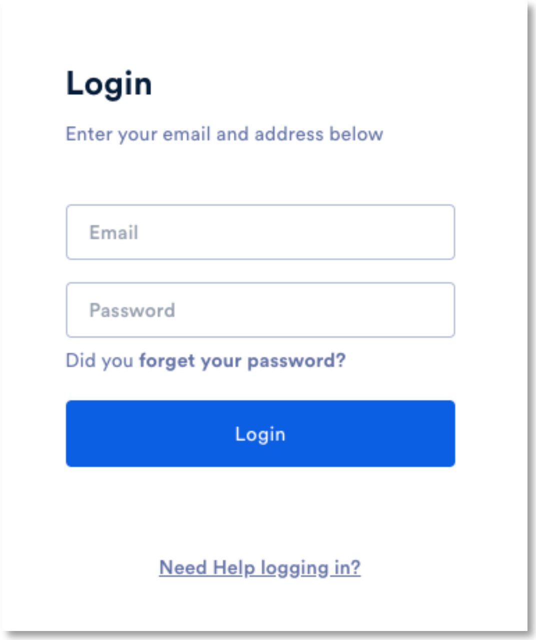
LOGGING IN TO APPILY'S LEAD DELIVERY PORTAL

How to Log In

1. If you are a **new Appily partner**, you will need to have login credentials created for you. These will apply to both Appily's Client Portal and the Lead Delivery Portal. If you have not yet received these credentials, reach out to cx-partnersupport@eab.com for assistance.
2. Navigate to Appily's Lead Portal (**leads.appily.com**) and input your credentials.

If You Forgot Your Password

1. Navigate to **leads.appily.com**
2. Select "Did you forget your password?"
3. Enter your email address to receive a special access link
4. Once you receive the email, follow the link to reset your password. **This new password will apply to both Appily's Client Portal and Lead Portal**
5. To access your new lead files, return to Appily's Lead Portal (leads.appily.com)



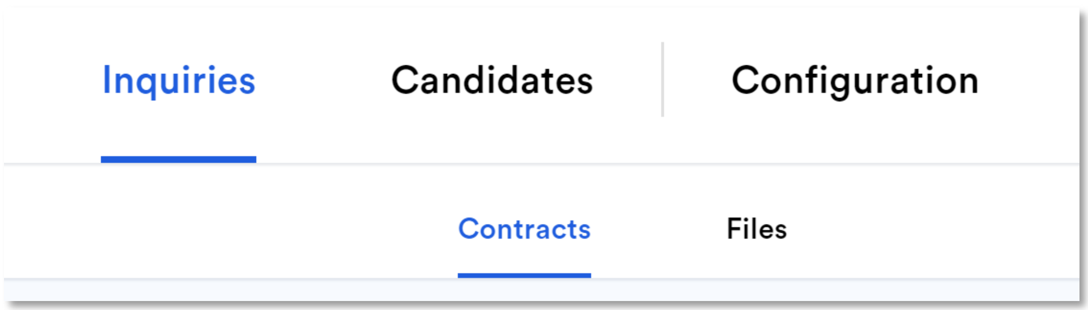
NOTE FOR LEGACY APPILY PARTNERS

If your institution has migrated to the new portal from the old platform, **you can access the new portal with your existing login credentials**.

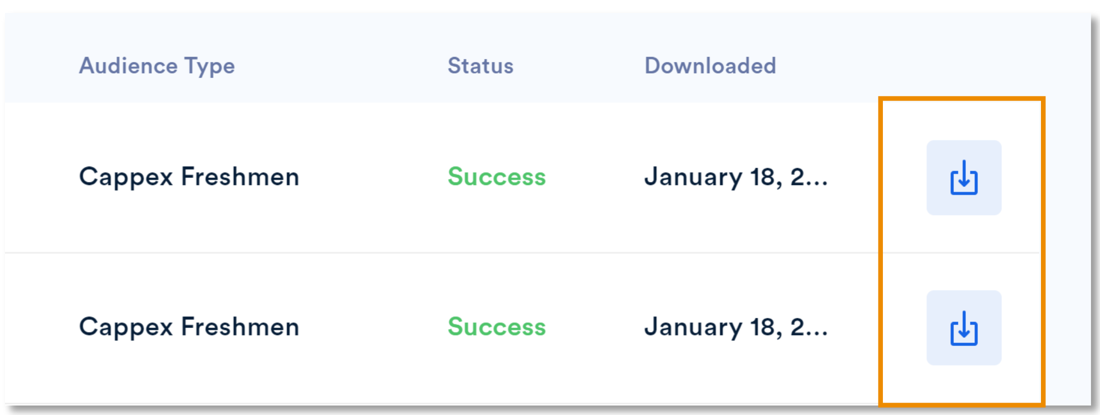
How to Navigate Appily's New Lead Portal

ACCESSING YOUR LEAD FILES

1. Upon logging into the portal, you will land on the Inquiry Contract view ("Inquiries" and "Contracts" will be highlighted in blue).
2. From here, to view and download your inquiries, select "Files." To download Candidates, you can select "Candidates" at the top of the dashboard and select "Files."



3. On this page, you will see:
   1. The date the file was generated
   2. The Audience type (Freshmen, Transfer, College Greenlight)
   3. The date the file was last downloaded (if ever)

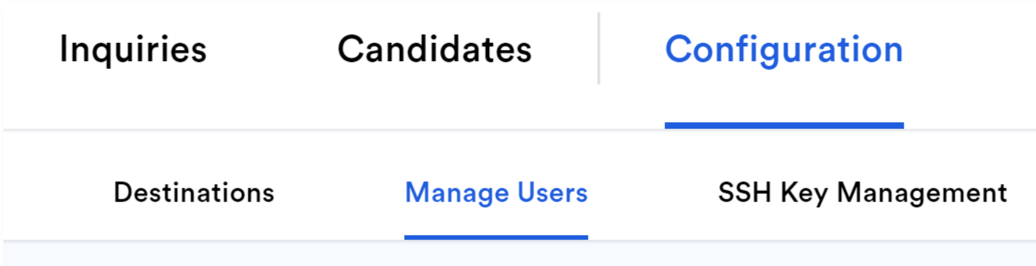


4. On the far-right side of the "Files" view, you will have the option to download your lead file.

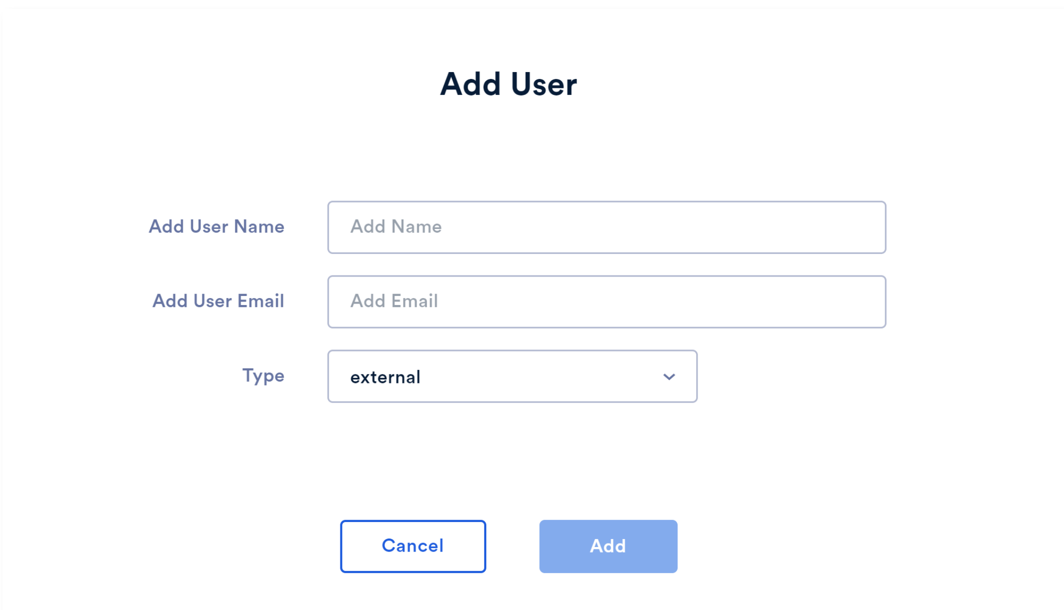
How to Navigate Appily's New Lead Portal

HOW TO ADD A NEW USER

1. On the "Configuration" tab, select "Manage Users."



2. Select "Add User" on the upper right corner of the screen and insert the user's name, email address, and type (e.g., external). Note that adding a user **will not create login credentials for the new user.** If the new user requires access the portal, contact cx-partnersupport@eab.com to request that credentials be created for them.



To enable new users to receive email notifications when new lead files are available, you must add also add them to relevant contract. To do so, contact **cx-partnersupport@eab.com** for assistance.

How to Navigate Appily’s New Lead Portal

SETTING UP A SECURE FILE TRANSFER PROTOCOL (SFTP)

Your inquiry files can be sent through an SFTP, which your team can map directly to your CRM. We offer two types of SFTPs:

1. **Partner-Hosted SFTP**

   How: We connect to an existing SFTP on your end.
   Benefit: Easily push Appily files to an existing SFTP server setup you might use for other vendors.

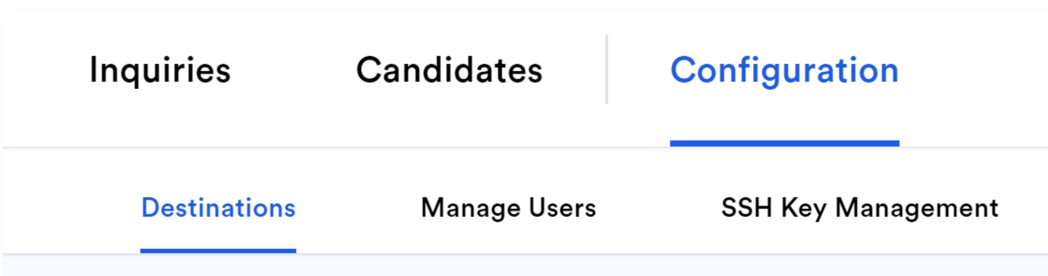
2. **Appily-Hosted SFTP**

   How: We set up an SFTP and give you credentials to connect to it.
   Benefit: Let Appily do all the heavy lifting to get the SFTP set up, and simply connect to it.

If you would like to host your own SFTP through your institution’s CRM (e.g., Slate), follow the steps below to provide Appily with your information. If you would like Appily to host your SFTP, contact Partner Support at cx-partnersupport@eab.com for assistance.

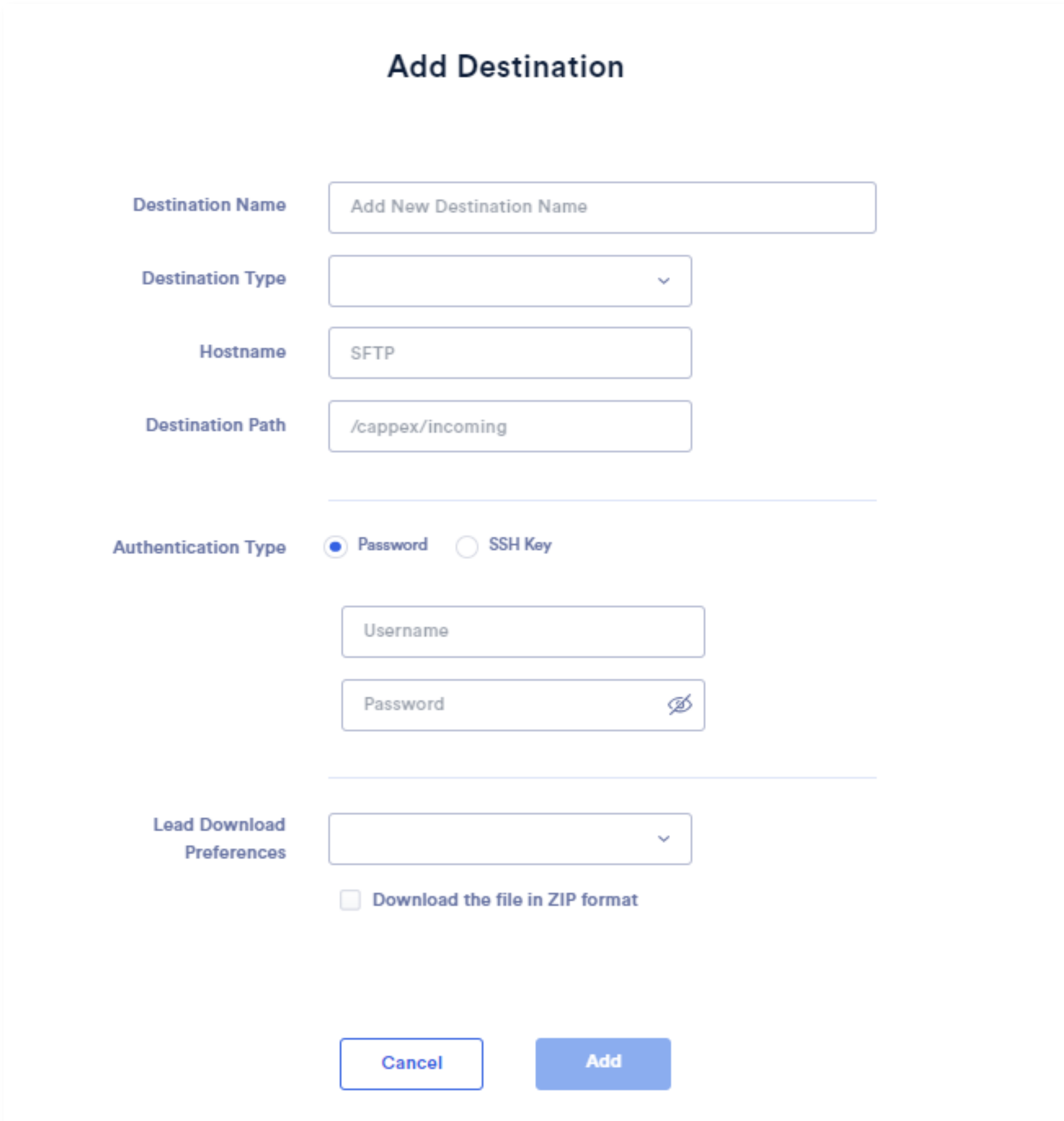
HOW TO ADD AN SFTP CONFIGURATION

1. On the ”Configuration” tab, select “Destinations”



1. Select “Add Destination”
2. Enter your configuration details. When you select “Add,” the credentials will be tested live. **If they do not work, the configuration will not save.**
   - **a) Destination Name:** This can be any name of your choice
   - **b) Destination Type:** SFTP (currently, this is the only drop-down option)
   - **c) Hostname:** Your CRM. If you’re using Slate, this will be *ft.technolutions.net*
   - **d) Destination Path:** If you’re using Slate, this will be */cappex/incoming*
   - **e) Authentication Type:** Choose “Password” or “SSH Key”
   - **f) Username/Password:** Access credentials for your CRM. If you’re using Slate, your Slate Captain will need to share these credentials with you.
   - **g) Lead Download Preferences:** CSV (currently, this is the only drop-down option)

How to Navigate Appily's New Lead Portal



Once necessary information has been collected, the SFTP set up should be completed within 2-3 days.